56615-2

AUGUST 1987

OREGON LABOR TRENDS

JULY INDICATORS

UNEMPLOYMENT RATE

Oregon		*(Seas. Adj)*
July	1987	6.0
June	1987	5.8
July	1986	8.5
U.S.		
July	1987	6.0
June	1987	6.1
July	1986	7.0

WAGE AND SALARY EMPLOYMENT INDEX

Oregon	*1977=100*	
July	1987	117.6
June	1987	116.8
May	1987	116.4
Apr.	1987	116.0
Mar.	1987	115.6

DIFFUSION INDEX

Oregon		
July	1987	67.1
June	1987	64.7
May	1987	60.9
Apr.	1987	61.6
Mar.	1987	61.6

PRODUCTION WORKER AVERAGE HOURLY EARNINGS

Oregon		
June	1987	$10.63
May	1987	$10.62
June	1986	$10.75

CONSUMER PRICE INDEX (CPI)

1967=100
ALL URBAN CONSUMERS

Portland-Vancouver	
July 1987	321.6
Yearly change	1.6%
Annual Average 1986	316.8
Yearly change	1.4%
U.S.	
July 1987	340.8
Yearly change	3.9%
Annual Average 1986	328.4
Yearly change	1.9%

Portland Hotline 221-4132

GOING UP

Jason Yohannan

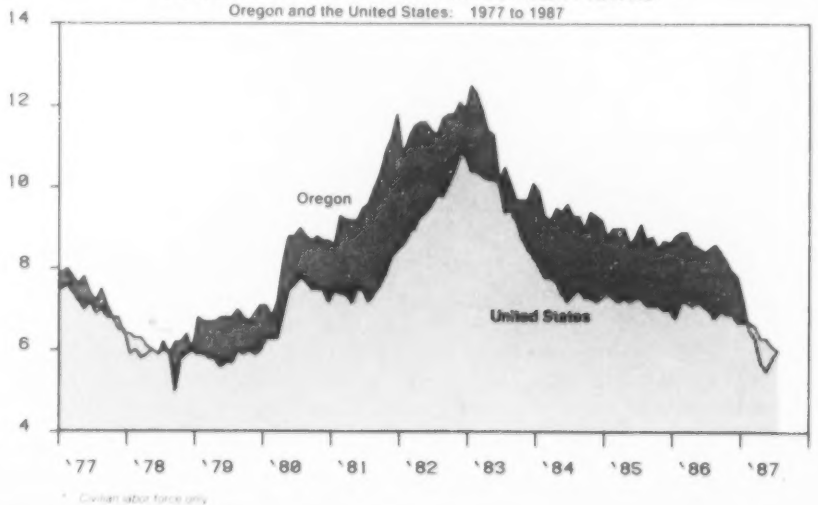
Seasonally adjusted unemployment in Oregon seems to have settled into the 6% range after many months of steady decline from the 8.5% annual average of 1986. At the same time, nonagricultural wage & salary employment has continued to chug along with moderate growth (in the neighborhood of 3.5% annually). Perhaps the most pleasant aspect of the past year's economic improvement is the virtual across-the-board expansion among Oregon's various industries. An in-depth look at the nonagricultural wage & salary employment index will attest to this fact, as will several charts included with this discussion.

Conceptually, we can think of the wage & salary index as simply measuring the level of wage & salary employment (often referred to as payroll employment) irrespective of normal seasonal influences. This allows comparison of any one month with any other, as long as both are indexed to the same base year. The base year currently in use is 1977, a somewhat "normal" year--occurring after the 1974-75 recession but before the topsy-turvy ups and downs of 1978-82.

The index is developed by seasonally adjusting current payroll employment, then indexing the result to (i.e., dividing it by) the 1977 annual average employment of 936,900. From a level of 100.0 in 1977, the index grew to a peak of 114.7 in November of 1979, reflecting the rapid growth of the late seventies. It then fell over the next three years, erasing the gains. In December of 1982, the index reached 100.6, the low point of the decade. Since then, it has slowly climbed back and recently exceeded the old peak, reaching an all-time high of 117.6 this July.

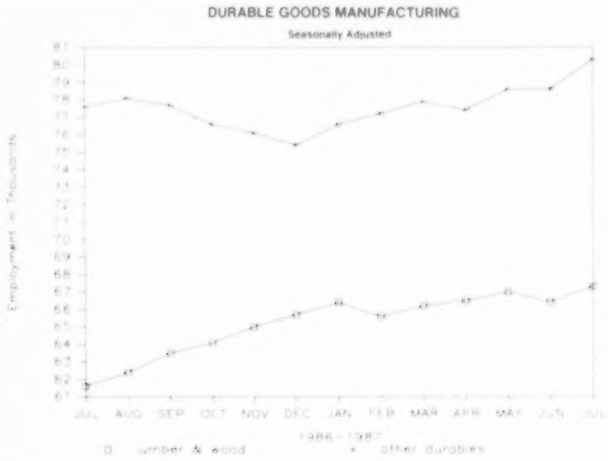
SEASONALLY ADJUSTED UNEMPLOYMENT RATES *

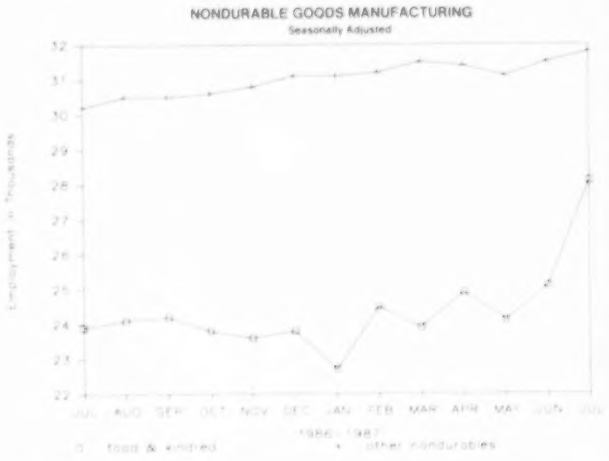
Oregon and the United States: 1977 to 1987



* Civilian labor force only

The Bureau of Labor Statistics no longer develops bimonthly CPI data for the Portland area. Beginning in 1987, the revised Portland-Vancouver index will be published on a semi-annual basis, i.e. in August covering the first half of each year and in February covering the second half of the year. For more information on these changes, we refer you to the article entitled "CPI REVISIONS: INTO THE FOREST" which appeared in the January 1987 issue of **OREGON LABOR TRENDS.





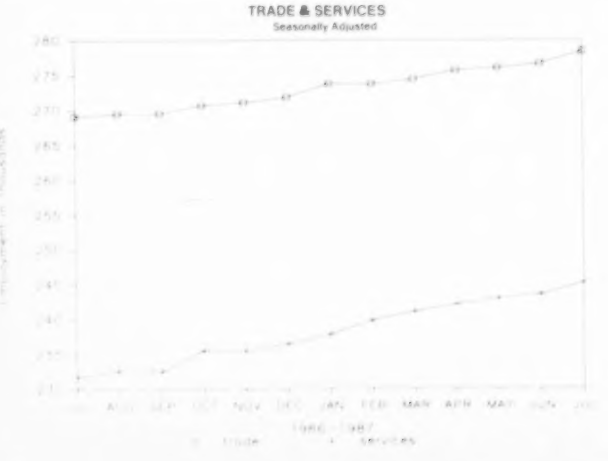
An intermediate step in the process of computing the wage & salary index includes the breakdown of payroll employment into its major industrial components. The advantage of doing so is to separate the various industries in order to more accurately define and identify their distinct seasonal patterns. Put another way, it is typically easier to find a job in Oregon during late summer than it is in mid-winter. In terms focuses on specific industries, however, there are better employment opportunities in trade during November-December (holiday hiring) and poorer government opportunities in July-August (education layoffs).

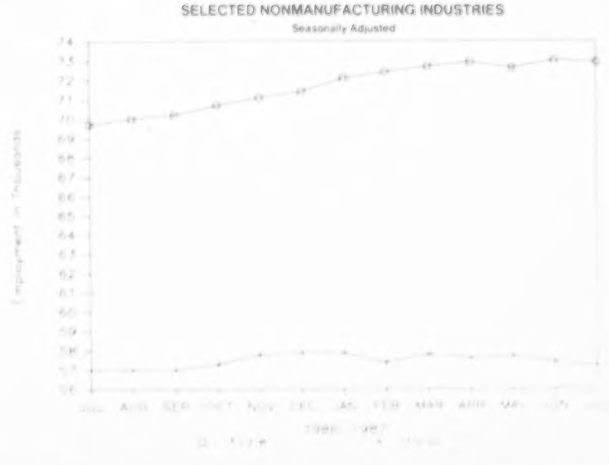
A side benefit of this separation is the ability to analyze employment trends on a seasonally adjusted basis for the index's component industries. The accompanying table and graphs exhibit this information.

In the first first graph, both lumber & wood producers and the remaining durable goods manufacturers show improvement during the preceding twelve months. Stimulated by the rebounding housing market and increased demand for wood products from overseas customers, Oregon's lumber producers have achieved record high production levels. Although productivity has been greatly enhanced--fewer employees required per unit of output--the employment trend is still upward. In other durables, the end of 1986 brought most of the recent cutbacks in the high technology sector to a close. While high tech finally settled down in early 1987, other industries, notably primary metals, fabricated metals, and portions of transportation equipment, continued an upward climb that was previously masked by the high tech layoffs. Now the direction for other durables is up.

In nondurable goods, July 1987 brought unprecedented employment levels to fruit and vegetable processors, thanks to an annual cycle pushed forward a few weeks by warm weather and early crop harvests, mostly in the Willamette Valley. Although food products employment in July was exceptionally high, there is still a slight, but detectable, upward tilt in the overall food products employment trend over the past year. Gradual improvement is also evident in other nondurable goods manufacturing industries. Credit for this belongs mostly to printing & publishing and rubber & plastic products. Commercial printers have hired help to meet new business needs, while plastic producers enjoy new markets for their products--in many cases replacing paper containers or metal objects.

On the nonmanufacturing side, the growth of trade and services has been




SELECTED NONMANUFACTURING INDUSTRIES
Seasonally Adjusted
Employment in Thousands
JUL AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL
1986-1987

OREGON SEASONALLY ADJUSTED EMPLOYMENT

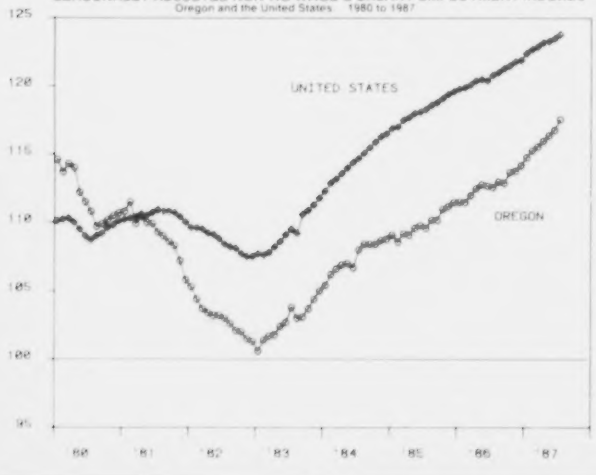
INDUSTRY	JUL 1986	AUG 1986	SEP 1986	OCT 1986	NOV 1986	DEC 1986	JAN 1987	FEB 1987	MAR 1987	APR 1987	MAY 1987	JUN 1987	JUL 1987
TOTAL WAGE & SALARY	1054.8	1058.7	1057.4	1065.3	1066.1	1069.8	1075.6	1079.8	1083.1	1086.7	1090.8	1094.4	1101.9
EMPLOYMENT INDEX (1977 = 100)	112.6	113.0	112.9	113.7	113.8	114.2	114.8	115.3	115.6	116.0	116.4	116.8	117.6
MANUFACTURING	193.3	195.1	195.9	195.1	195.5	196.0	196.8	198.5	199.5	200.2	200.8	201.6	207.5
LUMBER & WOOD PRODUCTS	61.6	62.4	63.5	64.1	65.0	65.7	66.4	65.6	66.2	66.5	67.0	66.4	67.3
OTHER DURABLES	77.6	78.1	77.7	76.6	76.1	75.4	76.6	77.2	77.9	77.4	78.6	78.6	80.3
FOOD & KINDRED PRODUCTS	23.9	24.1	24.2	23.8	23.6	23.8	22.7	24.5	23.9	24.9	24.1	25.1	28.1
OTHER NONDURABLES	30.2	30.5	30.5	30.6	30.8	31.1	31.1	31.2	31.5	31.4	31.1	31.5	31.8
NONMANUFACTURING	861.5	863.6	861.5	870.2	870.6	873.8	878.8	881.3	883.6	886.5	890.0	892.8	894.4
MINING	1.3	1.3	1.4	1.4	1.3	1.4	1.4	1.4	1.4	1.3	1.3	1.3	1.3
CONSTRUCTION	33.8	33.7	33.6	33.0	32.8	32.5	32.8	33.2	32.4	34.4	35.4	35.4	35.4
TRANS., COMM., UTIL.	57.0	57.0	57.0	57.3	57.8	57.9	57.9	57.4	57.8	57.6	57.7	57.4	57.2
TRADE	269.1	269.8	269.5	270.7	271.1	271.8	273.8	273.7	274.4	275.7	276.0	276.6	278.4
FINANCE, INS., & REAL ESTATE	69.7	70.0	70.2	70.7	71.1	71.4	72.1	72.4	72.7	72.9	72.6	73.0	72.9
SERVICES	231.8	232.6	232.5	235.5	235.4	236.4	237.8	239.8	241.1	242.1	243.0	243.5	245.2
GOVERNMENT	198.8	199.5	197.3	201.6	201.1	202.4	203.0	203.4	203.8	202.5	204.0	205.6	204.0
UNEMPLOYMENT RATE (seas. adj.)	8.5	8.6	8.4	8.2	7.9	7.8	7.2	6.5	6.3	5.7	5.5	5.8	6.0

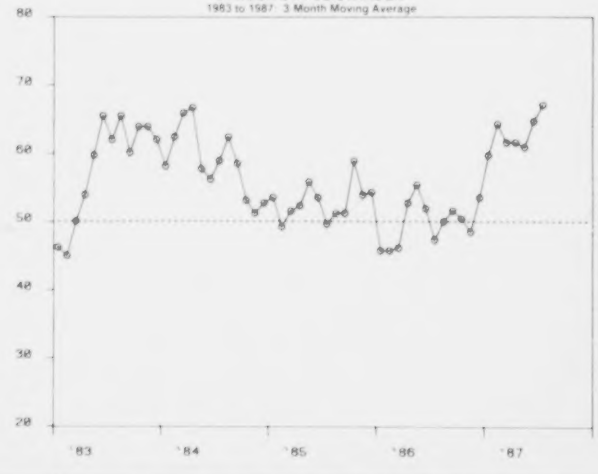
well documented in previous issues of this publication, so there isn't much need to restate these explanations. Suffice it to say that their graphs certainly fit the expected pattern. Smaller gains have also been made by finance, insurance, & real estate, government, and construction, with real estate the best among them.

The two industries apparently not sharing in the nearly across-the-board expansion are mining & quarrying and transportation, communications, & utilities. By the same token, during the past year, neither has seen significant decreases either. Traditional concepts of employment in the mining industry -- oil or coal extraction, mining of gold or silver ore, etc. -- do exist in Oregon, but the bulk of employment here lies in the quarrying of stone, sand, and gravel. Mining employment has been reasonably stable for the past couple of years. It is possible that a couple of pending projects could bring some improvement to this industry.

In transportation, communications, and utilities, the long-term decline of railroad employment has held down transportation numbers as trucking and other shipping modes have kept industry competition stiff. Communications employers continue to keep expenses (and, therefore, employment) as low as possible in the face of competition for the advertising dollar and the deregulated environment. Utilities did not see as much income as usual last year because of reduced demand for gas and electric heat during our mild winter.

A couple of months ago, a new record for wage & salary employment in Oregon was set, passing the previous high set in September 1979. The new record included a large shift in employment over that 7-8 year period from goods-producing to service-producing jobs, and much has been made of the implications of this shift. Even given the experience of the 1979-87 shift, the improvement in Oregon's wage & salary employment situation since the unemployment rate started its downward trend one year ago has involved just about every sector of the Oregon economy. □





RESIDENT OREGON LABOR FORCE

	JUL.[1] 1987	JUN.[2] 1987	CHANGE	%CHANGE	JUL.[5] 1986
CIVILIAN LABOR FORCE[3]	1,360,100	1,381,300	-21,200	-1.5	1,353,400
UNEMPLOYMENT	76,900	75,800	1,100	1.5	108,800
PERCENT OF LABOR FORCE	5.7	5.5	XXX	XXX	8.0
SEASONALLY ADJUSTED PERCENT	6.0	5.8	XXX	XXX	8.5
TOTAL EMPLOYMENT[4]	1,283,200	1,305,500	-22,300	-1.7	1,244,600

1/ Preliminary. 2/ Revised. 3/ Includes employed and unemployed individuals 16 years and older. Data are adjusted for multiple job-holding and commuting. 4/ Includes nonagricultural wage and salary, self-employed, unpaid family workers, domestics, farm workers, and labor disputants. 5/ Due to revised estimating procedures between December 1986 and January 1987, data for 1987 and that of previous years are not strictly comparable.

NONAGRICULTURAL WAGE AND SALARY EMPLOYMENT (BY PLACE OF WORK)

INDUSTRY	JUL.[1] 1987	JUN.[2] 1987	JUL. 1986	CHANGE FROM JUN. 1987	CHANGE FROM JUL. 1986
TOTAL[3]	1,098,400	1,111,000	1,051,100	-12,600	47,300
WAGE & SALARY EMPLOYMENT INDEX[4]	117.6	116.8	112.6	XXX	XXX
DIFFUSION INDEX[5]	67.1	64.7	47.3	XXX	XXX
TOTAL MANUFACTURING	212,700	204,100	198,200	8,600	14,500
DURABLE GOODS	150,100	147,400	141,700	2,700	8,400
LUMBER & WOOD PRODUCTS	69,900	68,400	64,100	1,500	5,800
LOGGING & SAWMILLS	36,200	35,100	32,000	1,100	4,200
VENEER & PLYWOOD	17,800	17,800	17,000	0	800
MILLWORK & STRUCTURAL WOOD	10,400	10,200	9,900	200	500
MOBILE HOMES	1,600	1,500	1,400	100	200
OTHER WOOD PRODUCTS	3,900	3,800	3,800	100	100
FURNITURE AND FIXTURES	2,500	2,500	2,600	0	-100
STONE, CLAY, GLASS & CONCRETE	3,500	3,400	3,500	100	0
PRIMARY METALS	9,300	9,200	8,500	100	800
BLAST FURNACES, IRON & STEEL	5,600	5,500	5,300	100	300
NONFERROUS METALS	3,700	3,700	3,200	0	500
FABRICATED METALS	10,900	10,700	10,500	200	400
FABRICATED STRUCTURAL METALS	4,900	4,800	4,600	100	300
OTHER FABRICATED METALS	6,000	5,900	5,900	100	100
MACHINERY	15,100	15,100	14,900	0	200
ELECTRICAL EQUIPMENT & SUPPLIES	13,400	13,300	13,000	100	400
TRANSPORTATION EQUIPMENT	10,600	9,900	9,000	700	1,600
INSTRUMENTS & RELATED PRODUCTS	12,000	12,000	13,100	0	-1,100
MISCELLANEOUS MANUFACTURING	2,900	2,900	2,500	0	400
NONDURABLE GOODS	62,600	56,700	56,500	5,900	6,100
FOOD & KINDRED PRODUCTS	30,400	25,000	25,900	5,400	4,500
CANNING & PRESERVING	19,700	14,400	15,100	5,300	4,600
OTHER FOOD PRODUCTS	10,700	10,600	10,800	100	-100
TEXTILE MILL PRODUCTS	1,700	1,600	1,400	100	300
APPAREL	2,300	2,300	2,100	0	200
PAPER & ALLIED PRODUCTS	9,200	9,000	9,200	200	0
PRINTING & PUBLISHING	12,200	12,000	11,600	200	600
CHEMICALS & ALLIED PRODUCTS	2,100	2,200	2,100	-100	0
PETROLEUM REFINING	500	400	400	100	100
RUBBER & PLASTIC PRODUCTS	3,700	3,700	3,300	0	400
LEATHER PRODUCTS	500	500	500	0	0
TOTAL NONMANUFACTURING	885,700	906,900	852,900	-21,200	32,800
MINING & QUARRYING	1,500	1,400	1,500	100	0
CONSTRUCTION	38,600	36,900	36,800	1,700	1,800
TRANSPORTATION, COMMUNICATIONS, & UTILITIES	57,600	57,600	57,300	0	300
TRANSPORTATION	36,400	36,500	35,600	-100	800
RAILROAD	4,100	4,100	4,400	0	-300
TRUCKING & WAREHOUSING	21,500	21,400	20,700	100	800
OTHER TRANSPORTATION	10,800	11,000	10,500	-200	300
COMMUNICATIONS	12,500	12,400	12,900	100	-400
UTILITIES	8,700	8,700	8,800	0	-100
TRADE	280,600	279,400	271,500	1,200	9,100
WHOLESALE TRADE	69,300	68,500	68,800	800	500
DURABLE GOODS	41,100	40,600	40,500	500	600
NONDURABLE GOODS	28,200	27,900	28,300	300	-100
RETAIL TRADE	211,300	210,900	202,700	400	8,600
GENERAL MERCHANDISE	26,500	26,100	25,600	400	900
FOOD STORES	35,300	34,700	32,900	600	2,400
AUTO DEALERS & SERVICE STATIONS	26,400	26,300	25,700	100	700
OTHER RETAIL TRADE	123,100	123,800	118,500	-700	4,600
FINANCE, INSURANCE, & REAL ESTATE	74,300	73,800	71,000	500	3,300
BANKING & CREDIT AGENCIES	23,900	24,000	24,000	-100	-100
OTHER FINANCE, INSURANCE, & REAL ESTATE	50,400	49,800	47,000	600	3,400
SERVICES	246,200	245,200	232,700	1,000	13,500
HOTELS & PERSONAL SERVICES	28,300	27,900	26,900	400	1,400
HEALTH SERVICES	75,900	75,400	73,600	500	2,300
OTHER SERVICES	142,000	141,900	132,200	100	9,800
GOVERNMENT	186,900	212,600	182,100	-25,700	4,800
FEDERAL GOVERNMENT	30,900	30,400	29,800	500	1,100
STATE GOVERNMENT	55,000	59,500	51,600	-4,500	3,400
EDUCATION	19,900	24,900	19,200	-5,000	700
OTHER STATE	35,100	34,600	32,400	500	2,700
LOCAL GOVERNMENT	101,000	122,700	100,700	-21,700	300
EDUCATION	55,100	77,100	55,800	-22,000	-700
OTHER LOCAL	45,900	45,600	44,900	300	1,000
LABOR MANAGEMENT DISPUTES	100	100	3,200	0	-3,100

1/ Preliminary
2/ Revised
3/ Includes full and part-time nonfarm wage and salary workers in pay periods including the 12th of the month. Proprietors, self-employed, private household workers and armed forces excluded. Note: Estimated in cooperation with the U.S. Bureau of Labor Statistics and Employment and Training Administration. All data are based on the 1972 Standard Industrial Classification (SIC) codes as amended by the 1977 supplement.
4/ Total nonagricultural wage and salary employment, seasonally adjusted, and indexed to 1977. Data on the earlier index (1972 = 100) can be converted to the 1977 base period by multiplying by a factor of .8264, the ratio between 1972's Annual Average Employment (774,300) and that of 1977 (936,900).
5/ The Diffusion Index is the percentage of a selected group of 43 industries showing an increase in seasonally adjusted employment. Half of those industries showing no significant change (less than 1/2 of 1%) are counted as increasing.

HOURS & EARNINGS

David Cooke

In the manufacturing sector, hours and earnings estimates are divided into two broad categories: durable goods and nondurable goods. Historically, the two groups have been separated for analysis because they react differently to economic cycles. Durable goods products, whose replacement times are generally greater than three years, will experience fluctuating demand over time. Nondurable goods products, which must be continually purchased, generally experience more stable demand from year to year.

The estimation of hours and earnings data through the Current Employment Statistics program was started in 1950. Since that time, the average hourly earnings of production workers in durable goods has been greater than those in nondurable goods. These annual averages, shown in the accompanying graph, are not adjusted for inflation. The rise from $2 per hour in 1950 to $10 per hour in 1981, therefore, is mostly due to inflation.

The long-term graph strikingly shows how nondurable goods workers have consistently been paid less per hour than their durable goods worker counterparts. In 1986 and 1987, however, a convergence has occurred. The 1987 figures of $10.44 an hour for nondurable goods and $10.57 for durable goods have been estimated based on the first six months of this year.

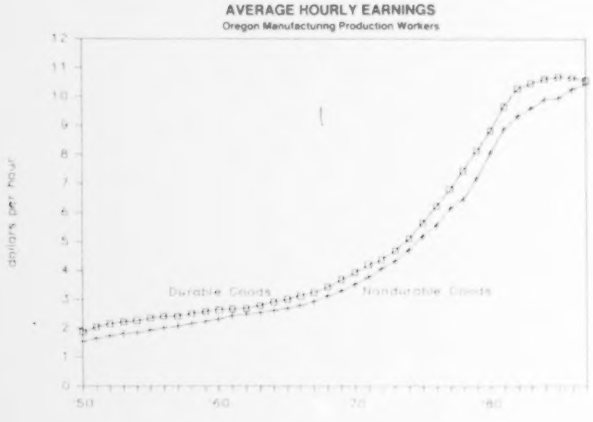
The other graph, hourly earnings on a monthly basis, shows how nondurable goods average hourly earnings actually exceeded durable goods for the first time late last year. The expected seasonal drop in the second half of the year for average hourly earnings in nondurable goods should bring the annual average below that of durable goods. The fact that nondurable hourly earnings were greater than durable earnings for the first time, however, is an indication of how Oregon's economy is changing.

Why has this change occurred, and what does it mean? Three industries are identified as primarily responsible for the changes in hourly earnings: paper & allied products and printing & publishing in nondurables, and lumber & wood products in durables. From June 1985

AVERAGE HOURS AND EARNINGS OF OREGON INDUSTRIAL PRODUCTION WORKERS[1]

	Average Weekly Earnings			Average Weekly Hours			Average Hourly Earnings		
	Jun[2] 1987	May[3] 1987	Jun 1986	Jun[2] 1987	May[3] 1987	Jun 1986	Jun[2] 1987	May[3] 1987	Jun 1986
TOTAL MANUFACTURING[4]	$419.89	$427.99	$419.25	39.5	40.3	39.0	$10.63	$10.62	$10.75
Durable Goods	427.20	436.72	432.73	40.0	41.2	39.7	10.68	10.60	10.90
Lumber & Wood Products	432.95	446.46	442.89	40.2	42.0	39.9	10.77	10.63	11.10
Logging & Sawmills	464.36	472.88	487.22	40.1	41.7	40.4	11.58	11.34	12.06
Veneer & Plywood	417.91	444.02	411.84	40.3	42.9	39.0	10.37	10.35	10.56
Millwork & Structural	369.15	378.06	361.49	40.7	42.1	39.9	9.07	8.98	9.06
Mobile Homes	318.69	311.69	326.99	37.1	35.5	37.2	8.59	8.78	8.79
Other Wood Products	427.18	448.38	418.04	40.8	42.5	39.7	10.47	10.55	10.53
Furniture & Fixtures	359.04	300.82	309.67	37.4	33.8	39.1	9.60	8.90	7.92
Primary Metals	503.46	508.25	478.36	41.2	41.9	40.3	12.22	12.13	11.87
Fabricated Metals	390.43	397.58	418.59	39.2	40.2	40.6	9.96	9.89	10.31
Machinery (Ex Electrical)	450.66	441.45	449.25	40.6	40.5	40.4	11.10	10.90	11.12
Nondurable Goods	399.29	400.13	382.13	38.1	37.5	37.1	10.48	10.67	10.30
Food & Kindred Products	326.86	325.08	315.22	37.7	36.0	36.4	8.67	9.03	8.66
Canning & Preserving	279.73	261.27	256.13	37.1	33.6	34.8	7.54	7.73	7.36
Other Food Products	408.95	410.78	421.01	38.8	38.9	39.2	10.54	10.56	10.74
Textile Mill Products	237.05	235.06	220.40	35.7	35.4	34.6	6.64	6.64	6.37
Apparel	224.96	213.84	220.60	38.0	36.0	37.2	5.92	5.94	5.93
Paper & Allied Products	627.27	634.48	609.03	40.6	41.2	40.2	15.45	15.40	15.15
Printing & Publishing	426.07	426.45	405.86	35.3	36.7	35.2	12.07	11.62	11.53
Construction[4]	486.63	495.06	488.60	36.1	35.9	36.3	13.48	13.79	13.46
Communications & Utilities[5]	538.55	549.79	512.89	41.3	41.4	40.9	13.04	13.28	12.54
Trade[5]	290.19	293.60	294.60	34.1	34.5	34.7	8.51	8.51	8.49
Wholesale Trade	392.46	399.57	401.36	37.2	38.2	37.9	10.55	10.46	10.59
Retail Trade	242.22	242.96	244.02	32.6	32.7	33.2	7.43	7.43	7.35
Banking & Insurance	313.03	319.53	309.88						
State & Local Government	355.42	355.29	342.60						

1/ Figures are average gross hours and earnings of full and part-time worked or paid for, including overtime and shift premium pay. Prepared in cooperation with the U.S. Department of Labor. All data are based on the 1972 Standard Industrial Classification (SIC) codes.
2/ Preliminary
3/ Revised
4/ Data for production workers only and exclude administrative, supervisory (above working foremen), technical, sales and office personnel.
5/ Data for nonsupervisory employees only, excluding proprietors and executive personnel. Data for retail trade excludes eating and drinking places.



to June 1987, paper & allied products increased $1.08 per hour, and printing & publishing increased $1.00. But in durable goods, lumber & wood products showed an average *drop* of $.47 an hour. The years before and after the recession show a clear divergence in the pay scales of these industries. Between 1978 and 1986, lumber & wood products average hourly earnings have increased by less than $3, while paper & allied products has grown by nearly $8.

The recent decline in average hourly earnings in wood products was the result of wage cuts in lumber, veneer, and plywood mills which hit especially hard in the summer of 1986. These cuts were caused by factors which have been widely discussed elsewhere; decreased demand for lumber & wood products during the recession of the early eighties, increased foreign and domestic competition, and decreased labor demand due to automation. The increases in wages in paper & allied products, on the other hand, can be attributed to other reasons. The demand for paper comes mainly from business uses and consumer packaging, and is much more stable over long-term business cycles than the demand for building materials. The paper industry in Oregon is highly unionized. The workers in paper & allied products also work a substantial amount of overtime, which results in higher average hourly earnings.

Oregon's economy is changing. No longer can the typical manufacturing worker be thought of as a highly paid millworker. These hours and earnings data are a small indication of an evolving economy, in which many factors must be assimilated to develop an accurate picture of present working conditions. □

WOMEN WORKERS IN OREGON INDUSTRY

Graham Slater

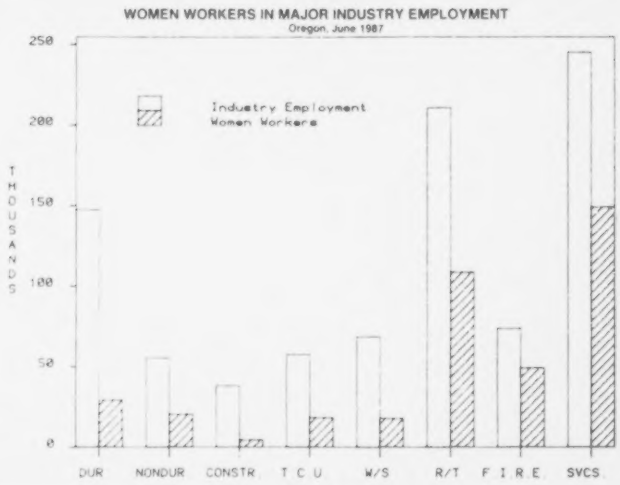
Over the past few decades, several trends with important long-term implications have affected employment and unemployment in Oregon (and across the Nation). Examples include the employment shift from manufacturing to nonmanufacturing industries, increasing use of computerized equipment promoting record high levels of productivity, a push toward part-time employment in many growing industries, and a steady increase in the number of women seeking employment outside the home. This last trend provides the subject matter for this article.

In 1950, 33.9% of the United States' working age women were part of the labor force. Of these, 5.7% were unemployed while the 17 million women with jobs made up just 29% of total employment across the Nation. A steady, consistent trend then began changing the picture as the female labor force participation rate grew to 37.7% in 1960, 43.3% in 1970, and roughly 55% by the mid-eighties. According to a recent Bureau of the Census publication, "Women in the American Economy", women made up nearly 45% of employees across the United States in 1985.

This almost equal representation of the sexes in the workplace has many consequences economically, sociologically, and politically. However, equal representation in terms of total employment levels, does not imply similar equality across all industries. Women are frequently found in low-paying jobs, while men dominate high-paying manufacturing and upper level executive employment opportunities. The best source of current data on women in the workplace is the Employment Division's monthly survey of around 7,000 Oregon employers. Although the "women worker" data is rarely published at the state level, it does provide an interesting insight into structural differences within the Oregon economy.

The following statistics and analysis do not include data on government employment. Information available from the survey is not sufficiently reliable to be used. Nationally, women make up just over half (50.4%) of government employment, and there is no reason to suspect that this level is far from the Oregon norm.

In June, private nonfarm wage and salary employment in Oregon was running at 897,800. Of these, 397,600 (44.3%) were women. The first graph shows this level (as the "all industry average") and demonstrates that the "traditional" manufacturing and construction industries have low proportions of women workers while growing sectors such as retail trade and services have high percentages. (The abbreviated industry titles on the graphs represent durable manufacturing; nondurable manufacturing; construction & mining; transportation, communications



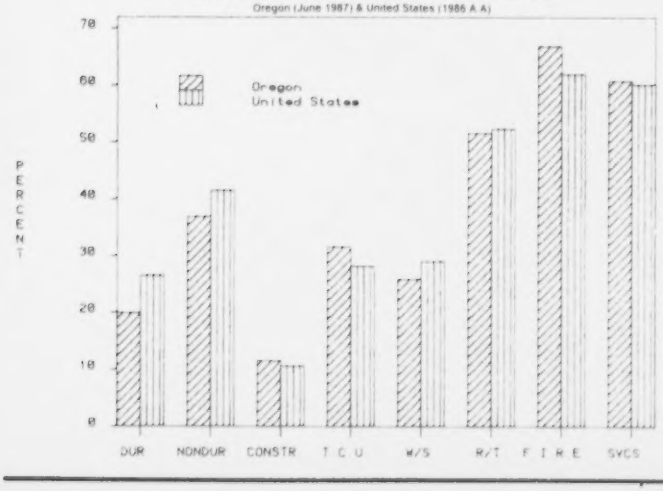
& utilities; wholesale trade; retail trade; finance, insurance & real estate; and services, respectively.)

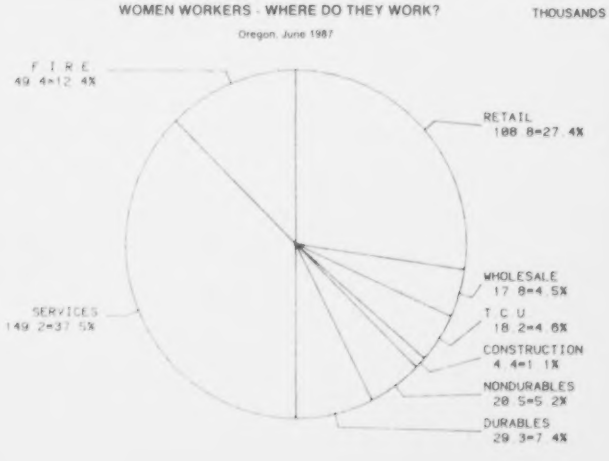
One quarter of Oregon's manufacturing employees are women. Among major manufacturing industries, primary metals recorded the lowest representation (9.8%) while instruments and related products (part of the high-tech group of industries) is made up of 42.5% women. A large discrepancy is evident between the manufacture of durable goods (19.9% female employees) and nondurables (36.9%). The former includes lumber and wood products, primary metals, and transportation equipment, while industries such as food products and printing & publishing make up the latter.

In nonmanufacturing, women hold a very slight lead in employment, with 50.1% of the jobs in June. Again, broad variation exists between industries (11.7% in construction to 66.9% in finance, insurance & real estate) and even within industries (18.9% in repairs, but 82.9% in health - both part of the services industry).

The second graph concentrates less on the proportional representation of women in each industry, but more on the number of women. While finance, insurance & real estate led all industries in the first graph, it lags behind services and retail trade in the number of women workers. Construction is confirmed as the last bastion of male domination both in terms of proportional and actual representation with only 4,300 women employees.

Analysis of graph three shows that there are some differences between Oregon and the U.S. in terms of the likelihood of finding women in any particular industry. Two reasons may be considered. The first relates to the different composition of Oregon's overall employment compared to that of the U.S. For example, the male-dominated lumber & wood products industry is far more important to Oregon's durables sector (with almost half the employment) than it is to durable goods employment across the Nation (less than one-tenth of the workers). So it is natural that wood products has a much higher impact on the ratio of women workers in Oregon's durable goods manufacturing than it does nationwide. The second reason may well be more sinister and more important to analyze and remove - that is a long-held belief that women simply "do not belong" in certain occupations. Again using lumber & wood as an example, it is notable that 15.7% of U.S. lumber workers are women, with a comparable level of only 12.1% in Oregon. Might it be that Oregonians are adapting more slowly than





some other areas of the country to the changing role of women in the workplace?

The final graph demonstrates much of the same data from a different viewpoint. Of all the women working in Oregon, where do most of them work? More than half (258,000) work in retail trade or services, two industries with a tendency toward low pay and part-time work. A rough estimate of 100,000 (based on the national average) find their place in government employment, while close to 50,000 can be found in finance, insurance, and real estate. A different perspective of the graph shows that only about one in ten women workers will be involved in some type of "goods-producing" (i.e. manufacturing, construction, or mining) endeavor. All others are in "service-producing" jobs.

All these data actually lead to more questions than answers. Are women in an excellent position because they dominate employment in the growing industries? Are they in a poor position having such low representation in high-paying manufacturing or construction establishments? To what extent is part-time employment also dominated by women workers? Will the labor force participation rate of women continue to grow, or will a saturation point (or at least a slowing point) be reached?

Perhaps future articles will continue this theme of inquiry. The results of the 1990 Census will offer a tremendous insight into the issue. One thing is certain. Understanding and planning for the role of women in the workplace must be among the prime considerations of economic, sociological, and political planners across this nation. Otherwise, misunderstanding, misuse, and workplace friction are the inevitable consequences. □

EMPLOYERS' CORNER - INVESTING IN OREGON'S FUTURE

Dorothy Monnier

Rapid economic and social changes have dramatically changed our work force and our parenting practices. The supply of accessible, affordable, good child care has not remotely kept up with the change in the workforce. This is creating a quiet crisis for employers nationwide. The effects of this major family crisis results in increased employer-employee stress, turnover and employee absenteeism.

In the last ten years the structure of Oregon's workforce has changed dramatically.

- Sixty percent of two-parent families have both parents employed, and their average buying power is less than a single-earner family twenty years ago.
- Approximately half of mothers with children under age six are employed. The fastest growing group in the workforce is mothers with children under age one.
- Nearly two-thirds of mothers of grade-school children are employed.
- Two-thirds of employed women are single, widowed, divorced, or have husbands who earn less than $15,000 per year.
- Two-thirds of entrants to the workforce in the next fifteen years will be women. Eighty percent of these women will be of child-bearing age, and up to ninety percent of this group will become pregnant at some point.
- Fifty percent of children born today will live in a single parent family at some time before they reach age eighteen. Most single parents are employed. However, one child in three with a mother as household head lives in poverty, whether or not the parent is employed.
- Day care for one preschool child costs about $2,000 per year--one third of the gross income of a minimum wage worker.
- Tax-supported public assistance to a non-working mother with one preschooler is about $6,000 per year, similar to a full-time minimum wage job. Forty-five percent of unemployed single mothers would work if child care were available at reasonable cost.

The availability of affordable, quality child care has not kept pace with the need for this service for today's employed families. A survey cited in American Demographics last year indicated that working parents cost three percent more than other employees in decreased productivity.

You need to be aware of this problem. . . There is new legislation that will assist Oregon employers who are willing to aid employees with child care. The legislation provides a tax credit worth fifty percent of any money spent directly or indirectly on support services for child care. This includes providing or contracting for day care facilities, referral services, payment subsidies, and other parent support services. If you have questions relating to this issue, call Dawn Marges, Coordinator, Community Priorities Child Care, Telephone (503) 399-5271. □

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